

Navigate Between Sites & Add a New Site

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Pathway: Accounts > Search > Account Details Screen

From the Customer's screen, users can quickly navigate between the different site locations under the parent account and add a new site.

The screenshot shows the Navusoft account details screen for account 41898001. A red box highlights the '1 of 7' indicator in the top left corner. A red arrow points from this indicator to the 'SITE SEARCH' popup window. The popup window displays a table of sites with columns for SITE ID, NAME, STATUS, OLD ID, ADDRESS, SITE CLASS, SALES REP, and DIVISION. The table lists 7 sites, with the first one being 'Navusoft - Demo' (Active, 978 Day(s)).

SITE ID	NAME	STATUS	OLD ID	ADDRESS	SITE CLASS	SALES REP	DIVISION
41898001	Navusoft - Demo	Active 978 Day(s)		Post Oak Blvd Corpus Christi, T... Nueces County		House Account	CORPUS Christi
41898002	Navusoft - Dem...	Inactive 1016 Day(s)		Cherry Wood St Houston, TX 770... Harris County		House Account	DAYTON
41898003	Dave Test	Active 405 Day(s)		Forest Ave Rockville, MD 20...		DaveTest Tester	CORPUS Christi
41898004	Dave Test 2	Active 404 Day(s)		Forest Ave Rockville, MD 20... Montgomery Co...		Alex Brown	DAYTON
41898005	Dave Test 3	Active 404 Day(s)		Forest Ave Rockville, MD 20... Montgomery Co...		Alex Brown	DAYTON
41898006	Dave Test 4	Active 249 Day(s)		River St N Kitchener, ON N...		DaveTest Tester	DAYTON
41898007	Dave Test - Div 5...	Active 26 Day(s)		Lake S Rd Kitchener, ON N...		Alex Brown	CORPUS Christi

View All Sites

1. Select **# of #** (example: 1 of 2) to display the Site Search popup window.
 - **TIP:** Use the filtering options at the top of the Site Search screen to limit what types of site's display (Ex: only display sites where Status is Active).
2. Double-click within the row of the desired site. The site will open in current window's tab.

Add a New Site

1. Select **# of #** (example: 1 of 2) from the Customer's screen to display the Site Search popup window.
2. Select the green '+' icon from the upper right corner in Site Search and select *Sit*. A new 'Add Site' popup window will display.
3. Complete all required fields highlighted red in the *Basic Settings* tab and click **Save**. Additional fields should be completed based on your company's data entry procedures.
4. Select the *Billing Settings* tab and minimally complete all fields highlighted red and click **Save**. Additional fields should be completed based on your company's data entry procedures.

Add A Site Tab Descriptions

ADD SITE
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Basic Settings
Billing Settings
BIC Profile

<p>NAME <input style="width: 100%;" type="text"/></p> <p>NAME 2 <input style="width: 100%;" type="text"/></p> <p>ADDRESS LINE 1 <input style="width: 100%;" type="text" value="Enter a location"/></p> <p>ADDRESS LINE 2 <input style="width: 100%;" type="text"/></p> <p>CITY/STATE/POSTAL CODE <input style="width: 60%;" type="text"/> <input style="width: 10%; border: none; border-bottom: 1px solid #ccc;" type="text"/> <input style="width: 30%;" type="text"/></p> <p>PHONE 1 🇺🇸 <input style="width: 60%;" type="text" value="(999) 999-9999"/> <input style="width: 10%; border: none; border-bottom: 1px solid #ccc;" type="text"/> <input style="width: 20%;" type="text"/></p> <p>PHONE 2 🇺🇸 <input style="width: 60%;" type="text" value="(999) 999-9999"/> <input style="width: 10%; border: none; border-bottom: 1px solid #ccc;" type="text"/> <input style="width: 20%;" type="text"/></p> <p>OLD ID <input style="width: 100%;" type="text"/></p> <p>PO# <input style="width: 100%;" type="text"/></p> <p>SIGNATURE REQUIRED <input type="checkbox"/> LEED REPORTABLE <input type="checkbox"/></p> <p>NOTE <input style="width: 100%; height: 20px;" type="text"/></p> <p>WARNING ON OPEN <input style="width: 100%; height: 20px;" type="text"/></p> <p>ACCESS INFORMATION <input style="width: 100%; height: 20px;" type="text"/></p> <p>BUSINESS HOURS / SERVICE WINDOW <input style="width: 100%; height: 20px;" type="text" value="🕒"/></p> <p style="margin-top: 10px;">⚙️</p>	<p>DIVISION <input style="width: 100%;" type="text" value="Select Division"/></p> <p>SERVICE REGION 🔍 <input style="width: 100%;" type="text"/></p> <p>TAX REGION 🔍 <input style="width: 100%;" type="text"/></p> <p>SOURCE <input style="width: 100%;" type="text"/></p> <p>SALES REP <input style="width: 100%;" type="text"/></p> <p>STATUS <input style="width: 100%;" type="text"/></p> <p>SITE CLASS <input style="width: 100%;" type="text"/></p> <p>GENERATOR <input style="width: 100%;" type="text" value="Not Applicable"/></p> <p>EPA <input style="width: 100%;" type="text"/></p> <p>STATE ID <input style="width: 100%;" type="text"/></p> <p>ADDITIONAL SERVICE MINUTES <input style="width: 100%;" type="text"/></p>
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SAVE

Field Descriptions - Basic Settings

The Basic Settings tab includes vital site details like address, site name, notes, and other essential information for accounting and operational purposes.

Field	Description
Contact/Location Information (Name, Address, Phone)	Enter the contact and location information for the site.
Signature Required	If selected, the driver will be required to collect a signature each time they service the location.
LEED Reportable	If selected, data will be collected for environmental reporting.
Division	The region the account belongs to. The division the site is assigned determines who handles the site in other areas such as dispatch and operations and helps billing processing.

Field	Description
Service Region	Identifies the region the site belongs to.
Tax Region	Identifies the tax region the site belongs to.
Source	Indicates how the site originated and helps with future sales and marketing campaigns.
Sales Rep	The sales representative that manages the site.
Status	Indicates the current status of the site.
Site Class	The Site Class the site is included in.
Generator	The amount of waste expected to be generated by this site.
EPA	The EPA ID for the site.
State ID	The State ID for the site.
Additional Service Minutes	Expected additional service minutes needed to complete services for this site.
Note	Displays in the site details section when viewing the Customer screen.
Warning on Open	Displays as a site-specific pop-up warning anytime the site is accessed.
Access Information	Used for conveying information the driver will need to access a location. Displays every time the location is serviced.
Business Hours / Service Window	Used to identify a site's hours of operation. Select the calendar icon to add a schedule.

Field Descriptions: Billing Settings

The Billing Settings tab establishes the billing requirements for the site, including the receipt method for invoices and the designated billing contact.

ADD SITE
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Basic Settings

Billing Settings

BIC Profile

TAX EXEMPT?

TAX EXEMPT REASON

SURCHARGE GROUP

INVOICE BY EMAIL

PAYEE NAME

SAVE

Field	Description
Tax Exempt	If the site <u>is</u> tax exempt and no tax region was selected when the account was created, select the Tax Exempt check box.
Tax Exempt Reason	If the Tax Exempt box is checked, enter supporting information for the reason why the site is exempt.
Surcharge Group	Select a Surcharge Group if the site is subject to a surcharge.
Invoice Detail Level	Determines the amount of information the invoice should include.
Invoice By Email	If the site is receiving invoices by email, select: <ul style="list-style-type: none"> • Account Settings and the site will follow the parent account's settings. • Email With Link and the site will receive a URL link to open the invoice. • Email With PDF Attachment and the invoice will be attached to the email as a PDF.
Payee Name	Select the name of the site's billing contact if the contact is different than the account contact. Contacts are only assigned here. To create a contact, the Contacts tool must be used.

BIC Profile

The BIC Profile tab pertains to commercial establishments in New York mandated by law to arrange for the

collection of their putrescible waste and recyclables through a hauler licensed by the Business Integrity Commission (BIC).

ADD SITE
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Basic Settings

Billing Settings

BIC Profile

WASTE STREAM SURVEY	<input type="text" value="No"/>
BUSINESS TYPE	<input type="text" value="Not Selected"/>
CONTRACT TYPE	<input type="text"/>
OTHER FINANCIAL REQUIREMENTS	<input type="text"/>
COMMENTS	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>

SAVE

Field	Description
Waste Stream Survey	Indicates if a waste stream survey was completed for the site.
Business Type	Specifies the business categorization used to identify the type of waste generated by the site.
Contract Type	Indicates if the contract between the customer and hauler was written or oral.
Other Financial Requirements	Indicates if the site has other financial requirements.
Comments	Option to provide addition comments regarding the site's BIC profile.